Invitation to Tender for the Fifth Call for Outline Proposals under the Plan for European Cooperating States (PECS) in Cyprus

HANDBOOK
BASIC OF ESA PROCUREMENT

16/06/2021

DISCLAIMER

This handbook material does not contain sufficient information to be used, in any way, in the context of the ITT (Invitation-to-Tender)

This handbook is only an introduction to help understand, in a simplified manner, some of the Rules and Procedures associated with ESA procurements.

Please ensure that your Outline Proposal is compliant with the requirements contained in the official ITT [AO/1-10838/21/NL/SC] documentation found on esa-star.

Registration in esa-star is an essential pre-requisite to bid!

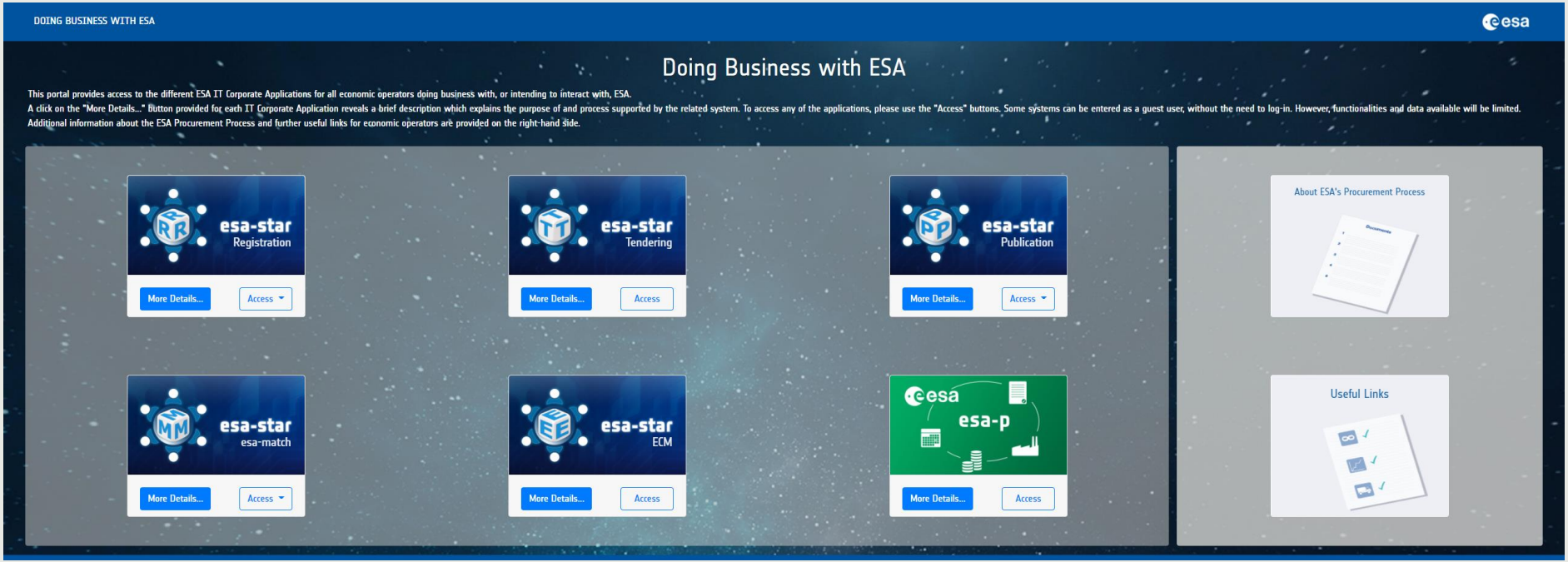
To register in esa-star:

https://esastar-emr.sso.esa.int/

HANDBOOK – BASIC OF ESA PROCUREMENT
ESA electronic procurement tools

https://doing-business.sso.esa.int/

- **Portal for access to the entire esa-star toolset, including associated ESA corporate applications like esa-p**
- **All applications are connected, making it easier for users to access the systems and retrieve information**
- **Optimised and supported for use with the Google Chrome browser**



HANDBOOK – BASIC OF ESA PROCUREMENT
esa-star Registration

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esa-star Registration

Registration on **esa-star** is a pre-requisite for all entities wishing to do business with ESA.

esa-star Registration supports the following processes:

- Registration of Legal Entities in the ESA corporate systems for tendering, purchase and financial tasks
- Collection and regular update of data provided by the registered entities used by ESA procurement, industrial policy and finance processes
- Registration and maintenance of entities' user information, in order to grant them access to the **esa-star Registration**, **esa-star Publication**, **esa-star Tendering**, **esa-match**, **esastar ECM** and **esa-p systems**.

esa-star Registration is made up of the two principal components:

- esa-star Registration Public Web Site: this application allows registration of a new entity in the ESA corporate tools.
- esa-star Registration Internal Web Site: this application allows updating of entity information as required and maintenance of entities' user account information, i.e. in order to grant entity users access to the esa-star Tendering, esa-star Publication, esa-match, ECM and esa-p systems.

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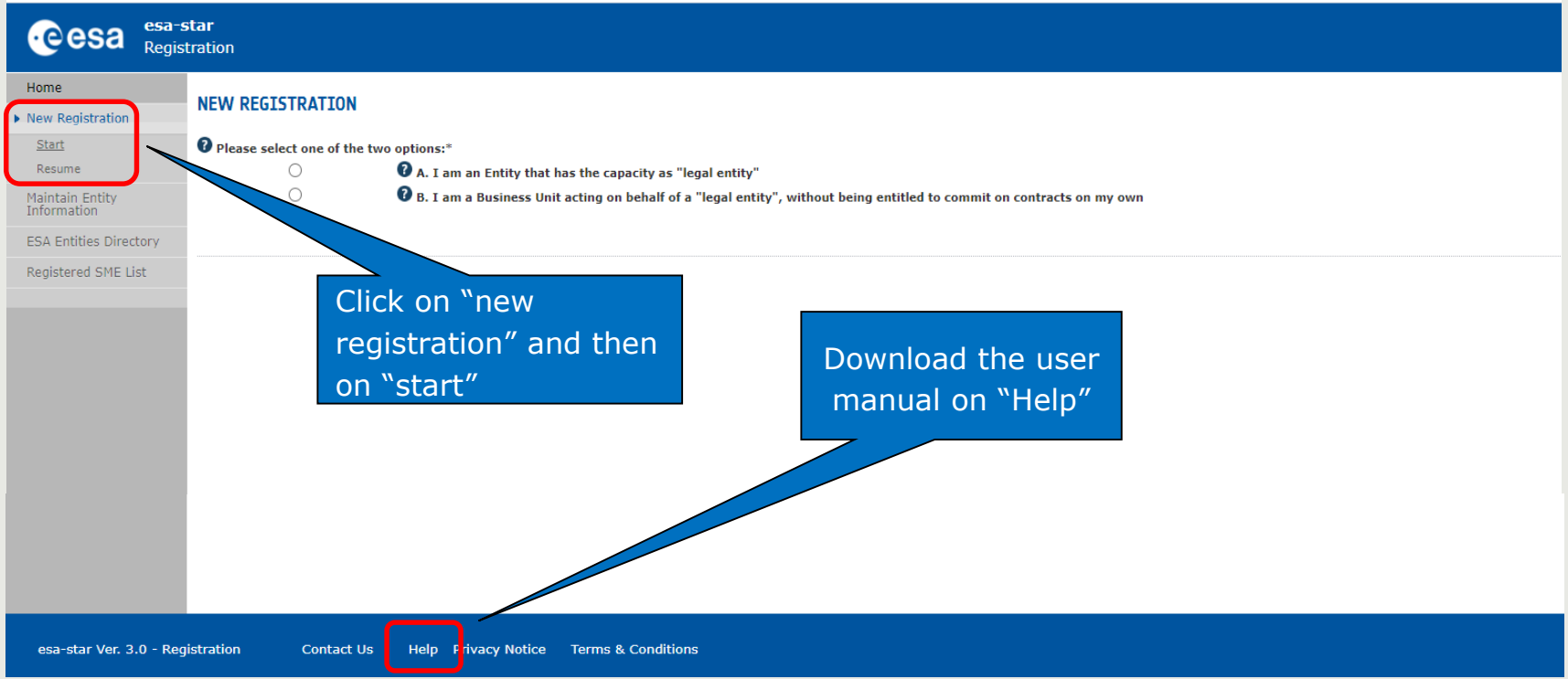
esa-star Registration



To become a "Registered Entity" with ESA (1/2):

1. The first step is to check whether your organisation is currently registered as an "Entity" and/or a "Business Unit" belonging to an existing Entity .

   A Business Unit shares the same VAT number with the main Legal Entity.

2. If not, you can register your entity by completing the ESA on-line questionnaire and submitting your entry for validation.

   Please mention if you have SME Status (Small and Medium sized Enterprises, definition from the EC). The SME status can be claimed. Validated SMEs within ESA can benefit from special SME tendering and payment conditions (when so defined).

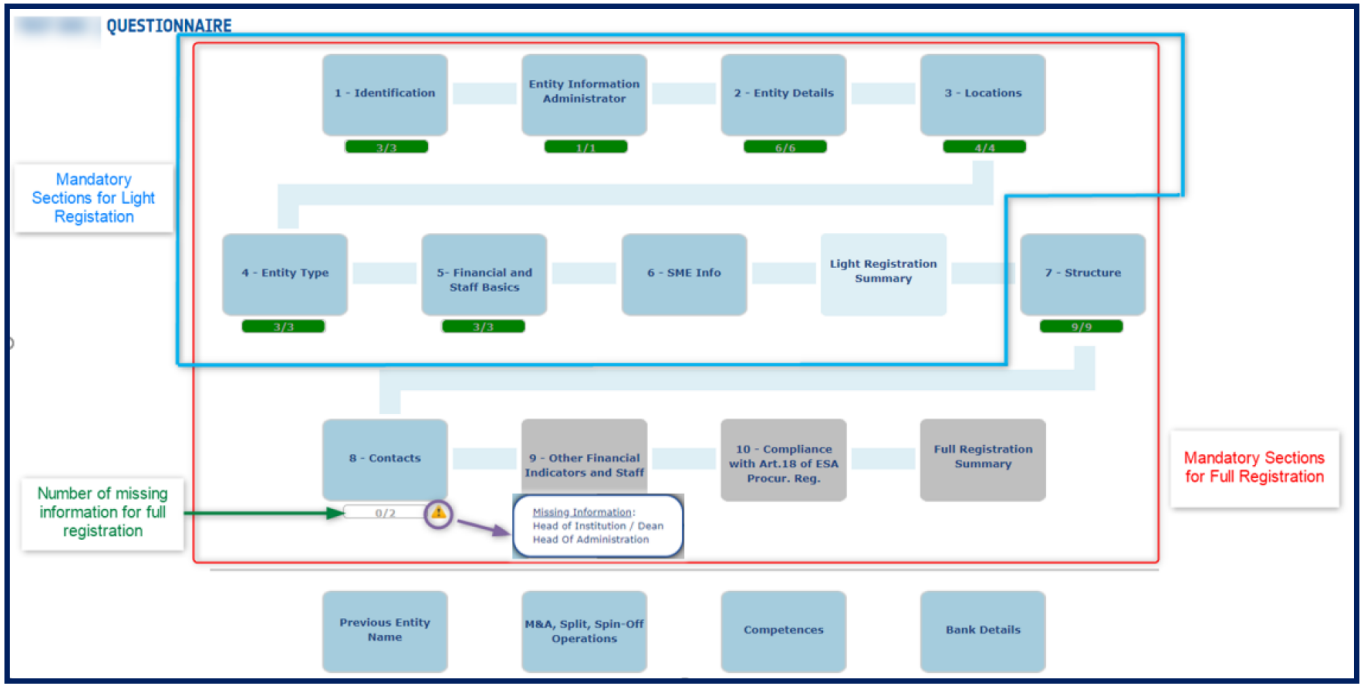
To become a "Registered Entity" with ESA (2/2):

3. You may carry out your registration in 2 steps:
   - **"Light" registration** awarded after entity nationality verification.
     Will grant access to esa-star services (i.e Access ITT, upload offers you are allowed to bid for in relation to your entity nationality).
   - **"Full" registration:**
     The award of ESA contracts requires a **"Full"** registration.

4. Once registration is validated, you will receive your login credentials to all esa-star tools.
5. If you need help:
   - Email esait.Service.Desk@esa.int
   - Phone +39 06 941 80700

esa-star Registration

The following image shows what information to provide for both a *Light Registration* and *Full Registration*.



Registration in esa-star is essential!

To register in esa-star:

Go to https://esastar-emr.sso.esa.int/

Support information in esa-star Registration User Manual:
https://esastar-emr.sso.esa.int/Account/DownloadFile

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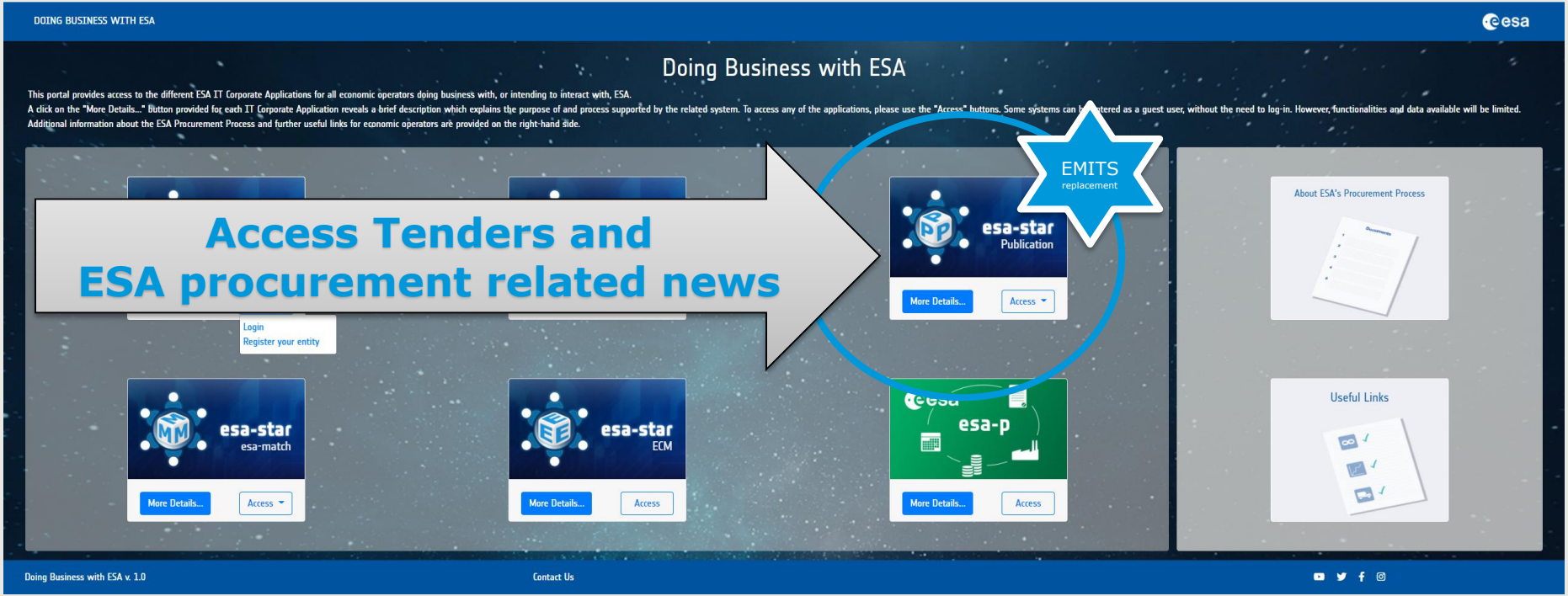

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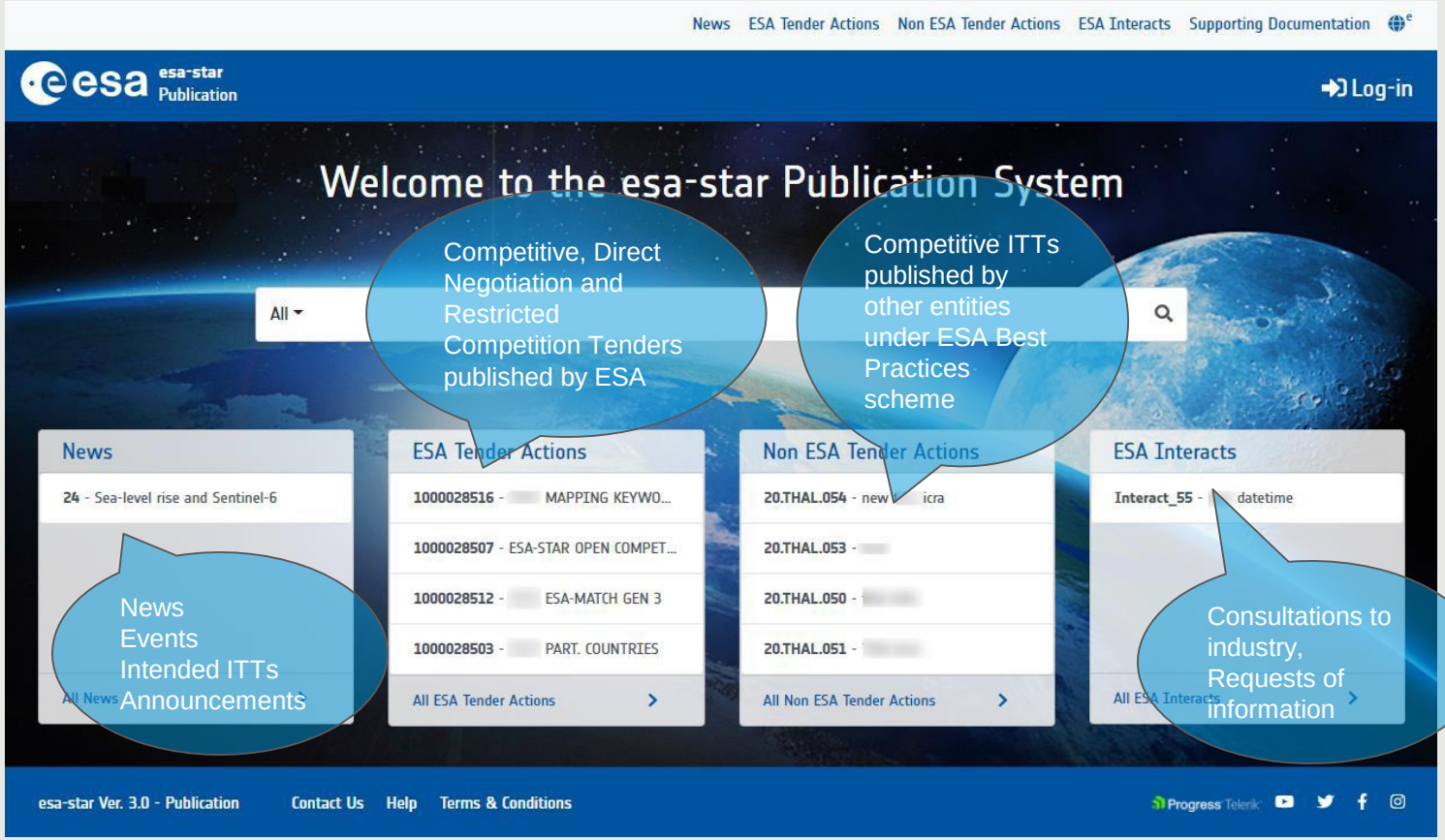
esa-star Publication



esa-star Publication

is the starting point for participating in Tender Actions

All registered users have access to esa-star Publication and, depending on their role, are able to:

- View news published by ESA
- Access information on ongoing and planned procurement actions, including ITT documents (ESA and non-ESA)
- Express interest in specific procurement projects
- Initiate proposal preparation by creating a bidder restricted area
- Access ESA interacts and submit a reply to ESA accordingly

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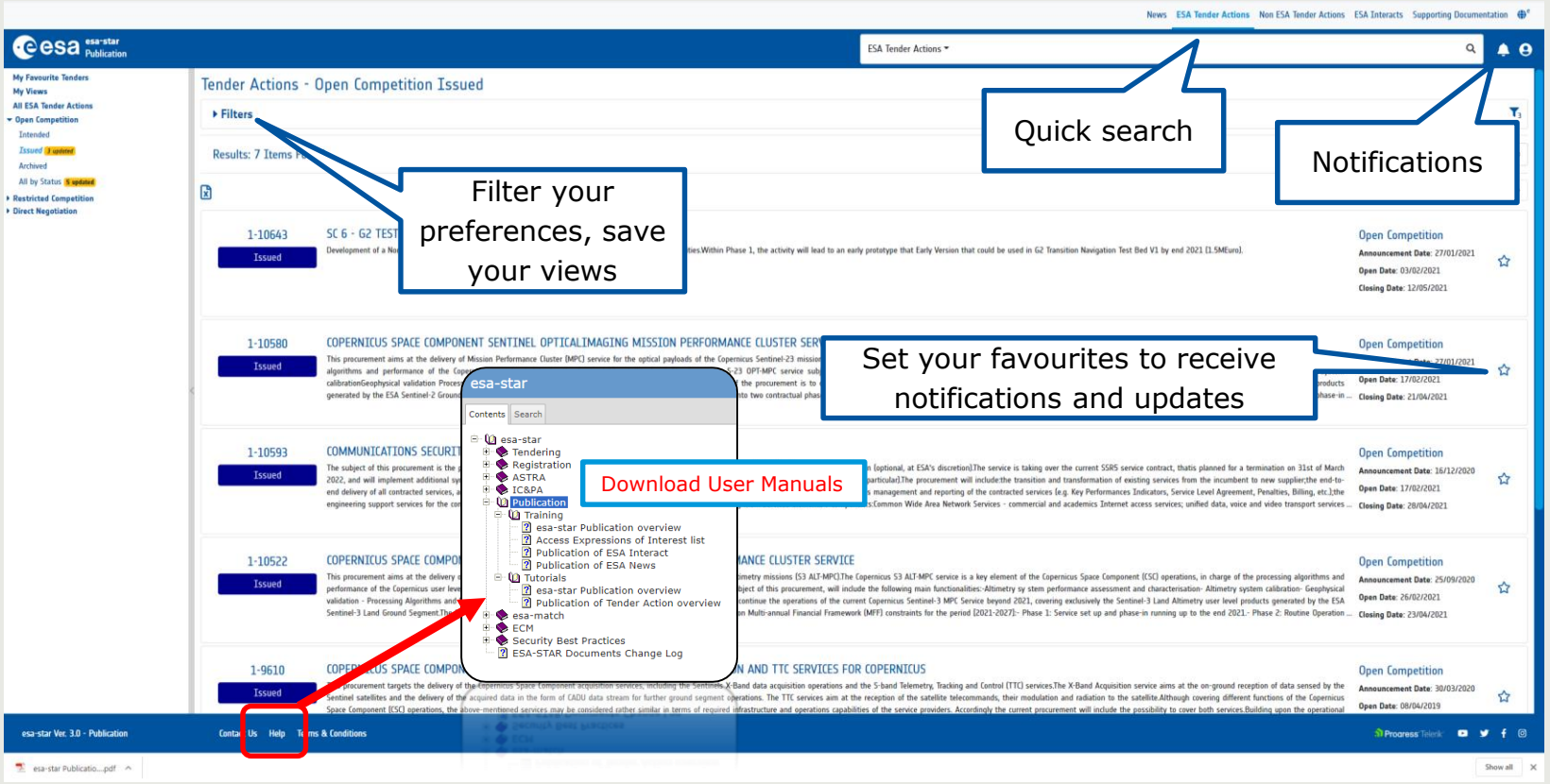
esa-star Publication



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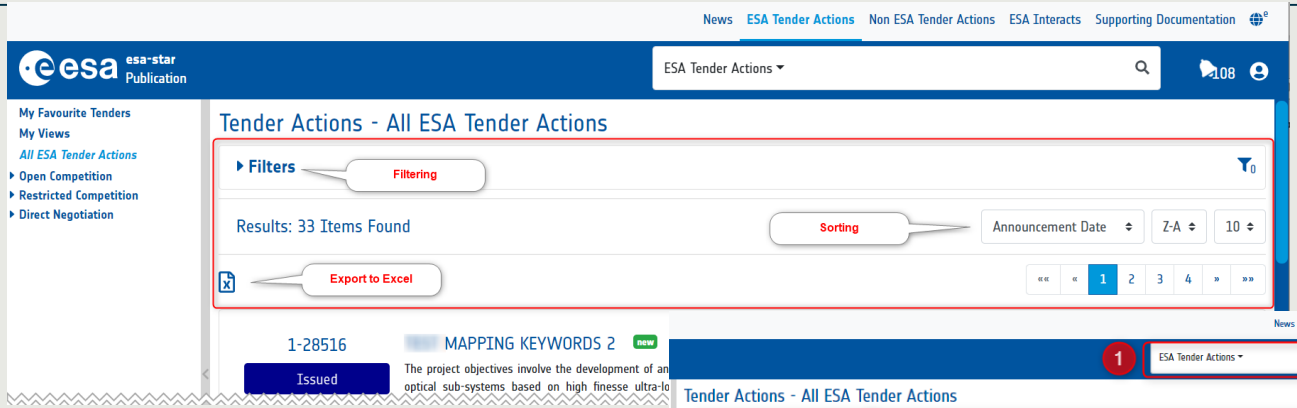

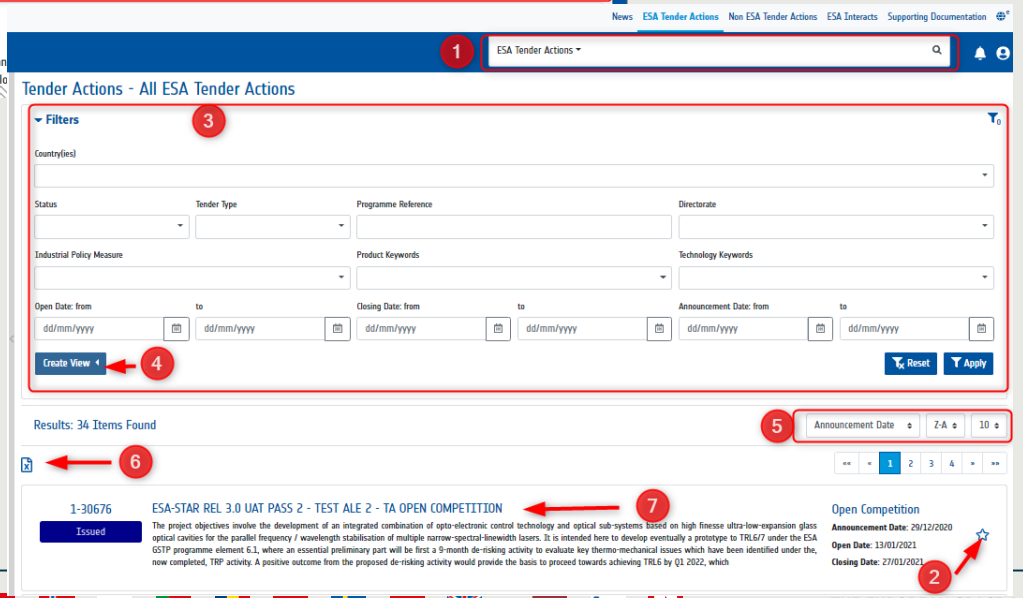

1. Full text search
2. Mark favourites
3. Available filters
4. Create a personal view
5. Sort your lists
6. Export to Excel
7. Access details of a tender by clicking its title

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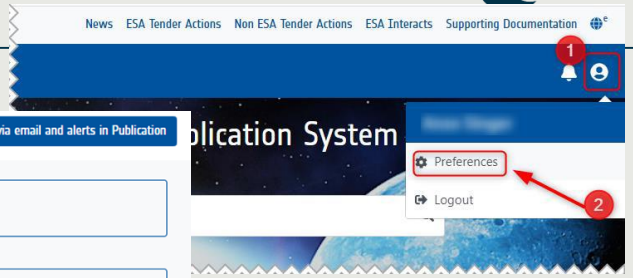
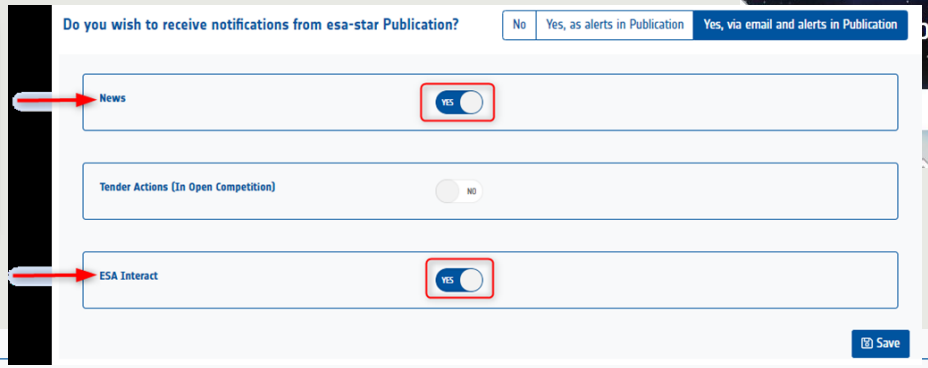
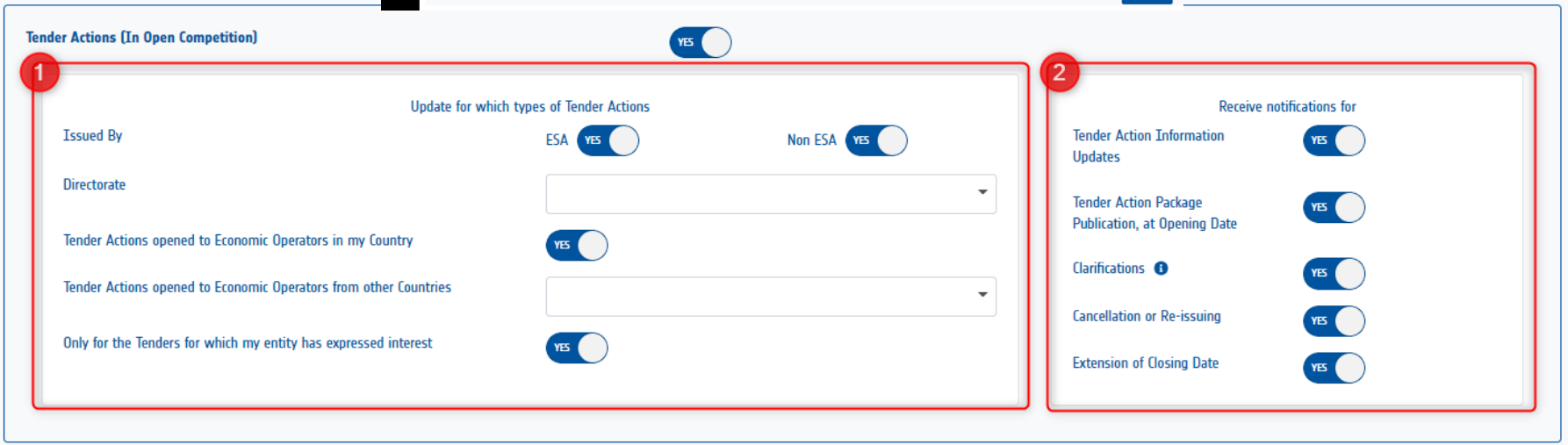
esa-star Publication

Be notified of tenders of your interest







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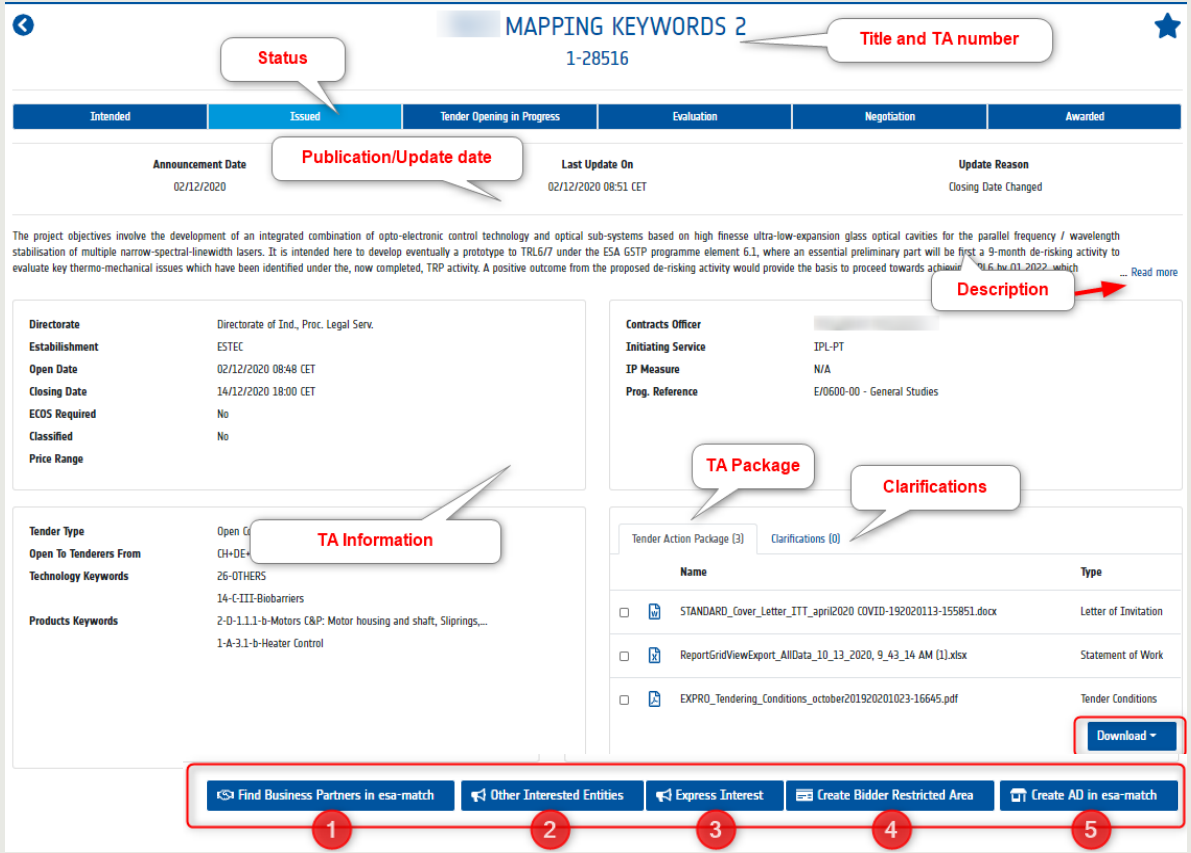
esa-star Publication

Detail of a Tender Action

1. Go to esa-match module to find a potential consortium
2. Displays the list of submitted Expressions of Interest
3. Allows you to express interest
   * See esa-star Publication Help - manual "Expression of Interest"
4. If you wish to submit an offer you have to create a Bidder Restricted Area in esa-star Tendering module
5. Allows you to create an ad in esa-match Marketspace (open competition only)



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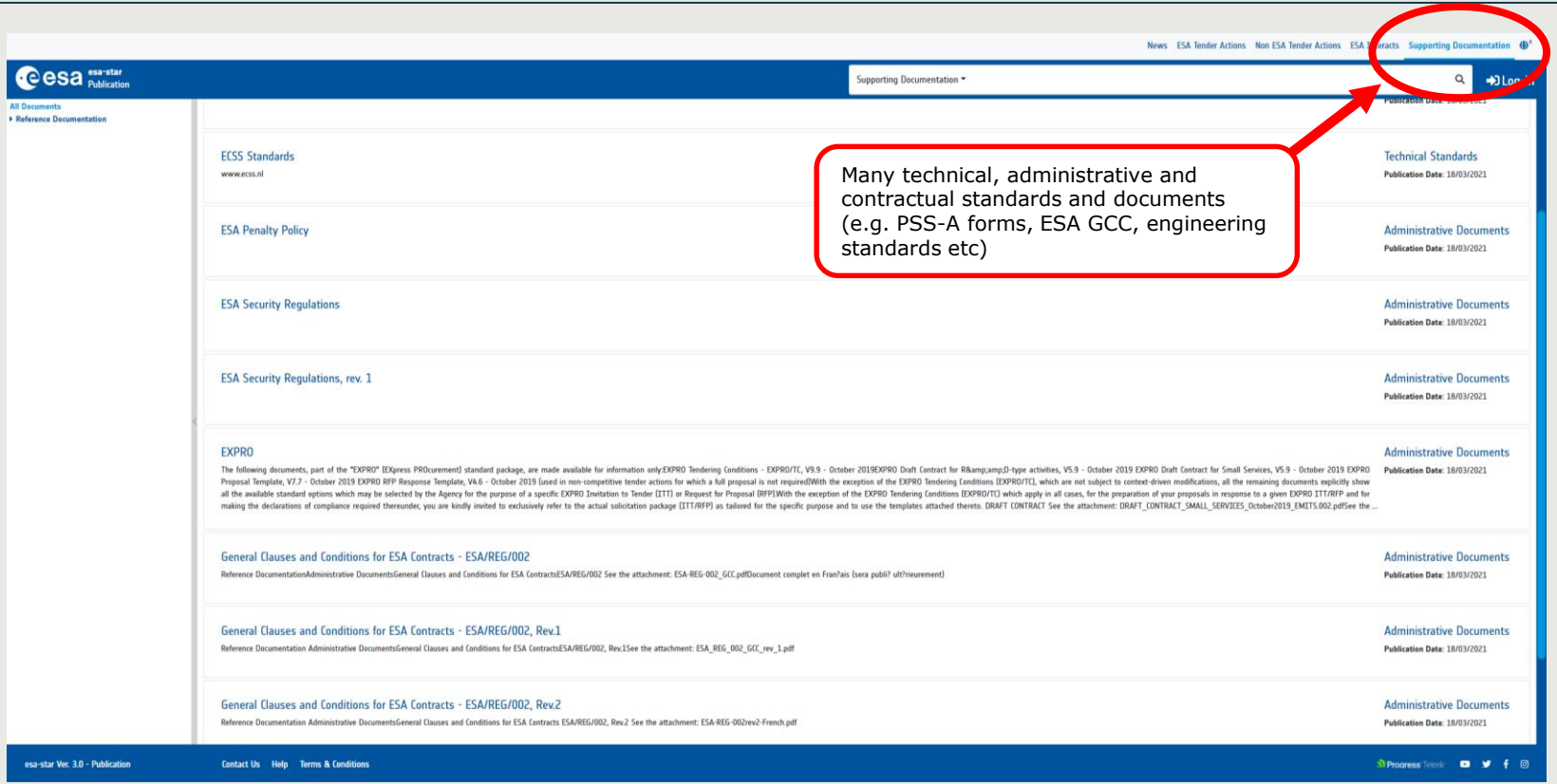

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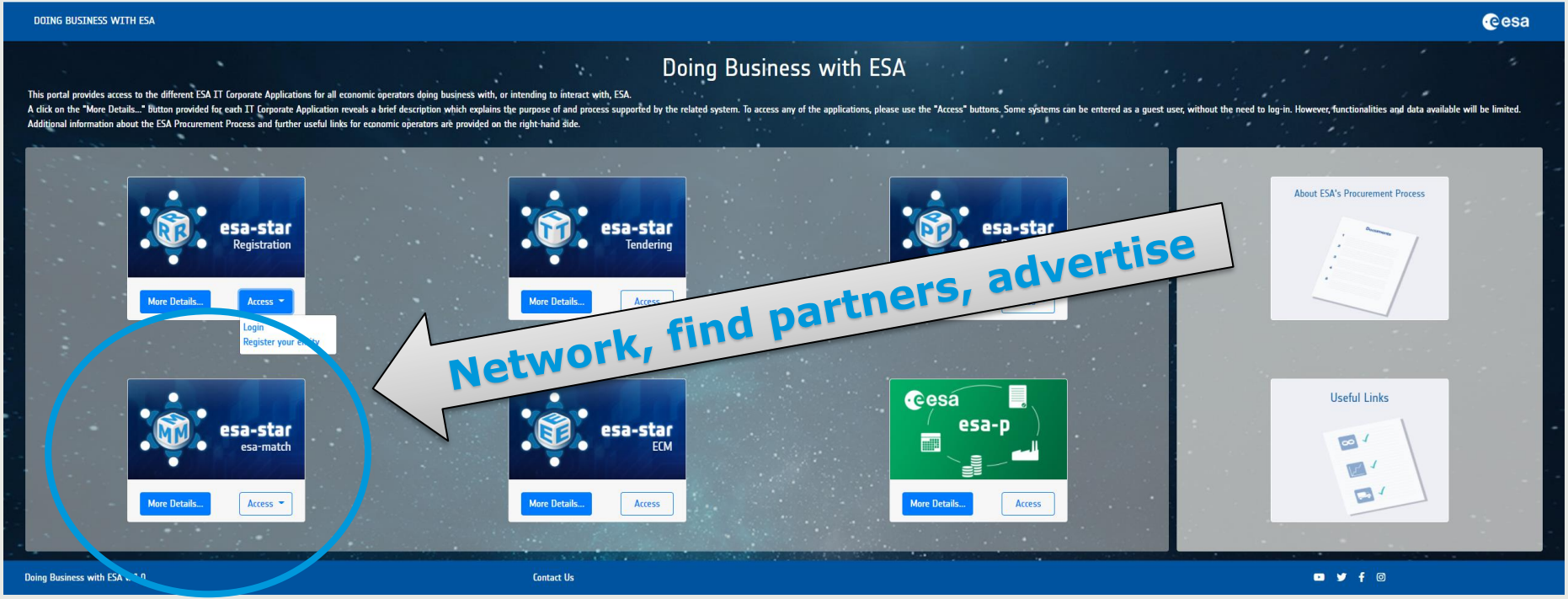
esa-match



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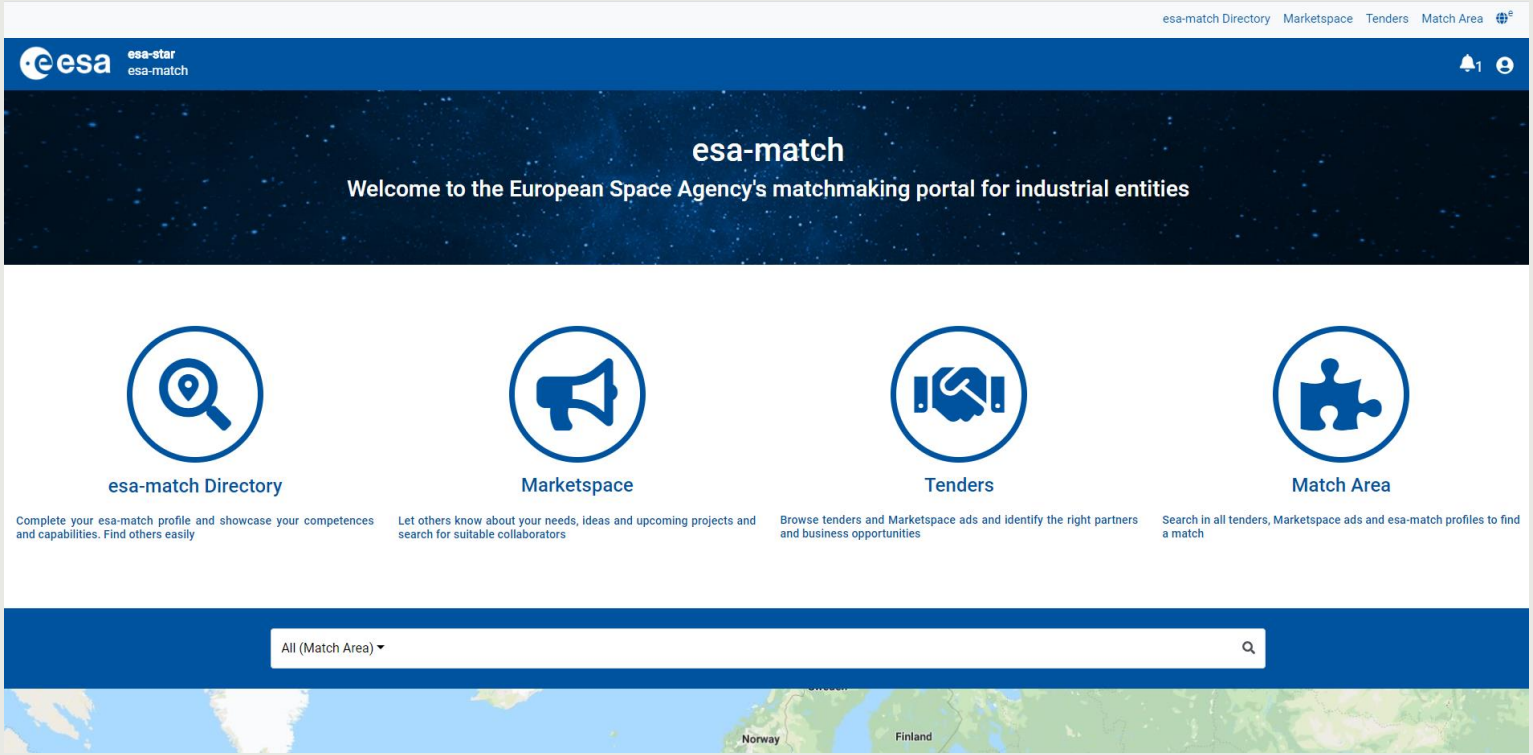
esa-match



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esa-match

esa-match profile pages for each Business Unit + Legal Entity

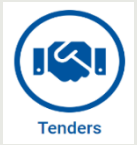
- Competences & Capabilities
- Experience (ESA contracts, other projects and studies [non-ESA]); Certifications)

esa-match Directory

- find entities. Option to filter, display them on a map, etc

Marketspace

- place "ads" (and link them to tenders)
- "I'm looking for" + "I offer"



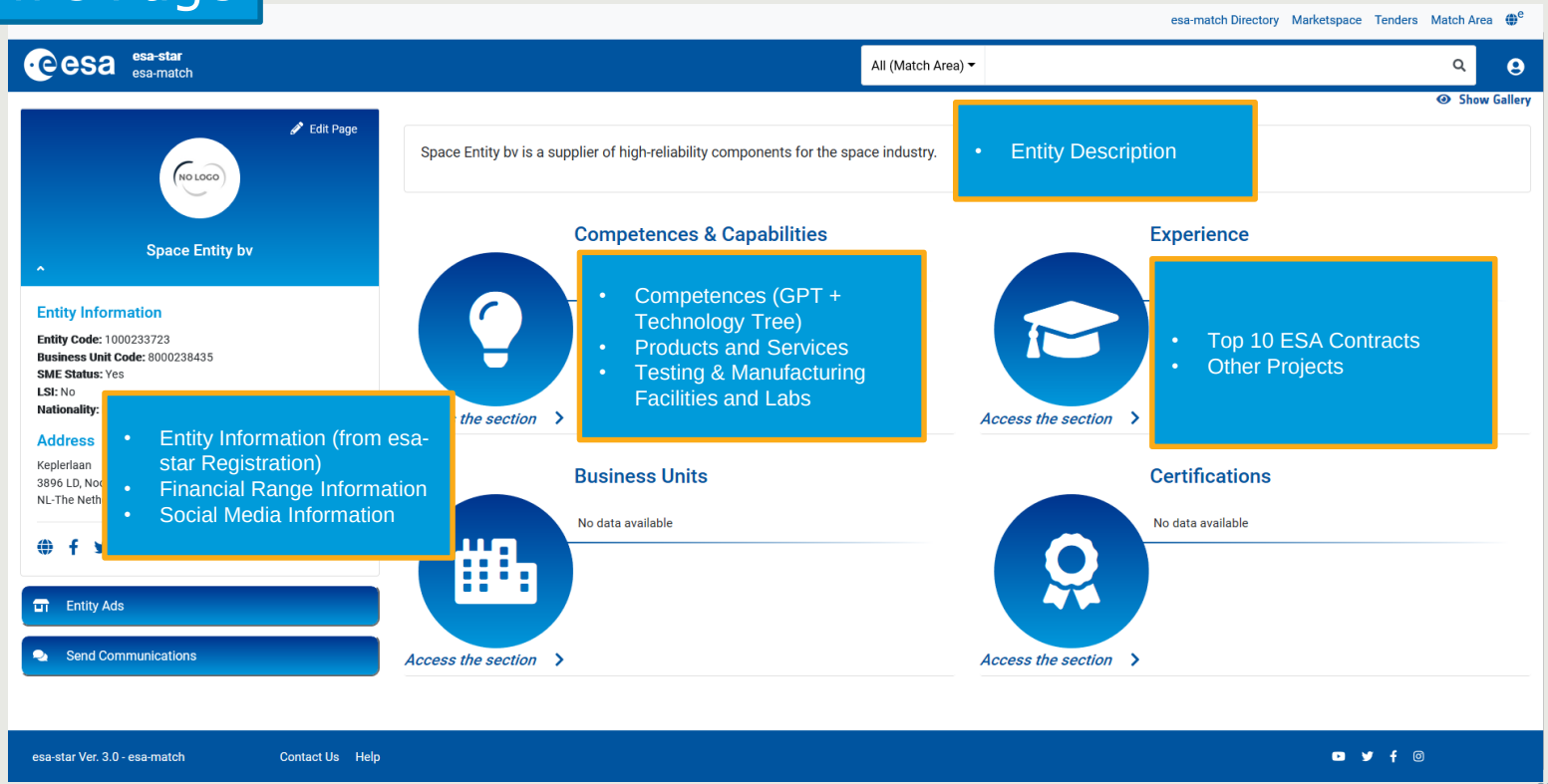
Tenders area

- search Tenders and ESA Interacts (new ESA Publication feature)
- area to find suitable "matches" (depending on competences set, country, etc)

"Lounge area" (communications area)

- for messages between industrial entities

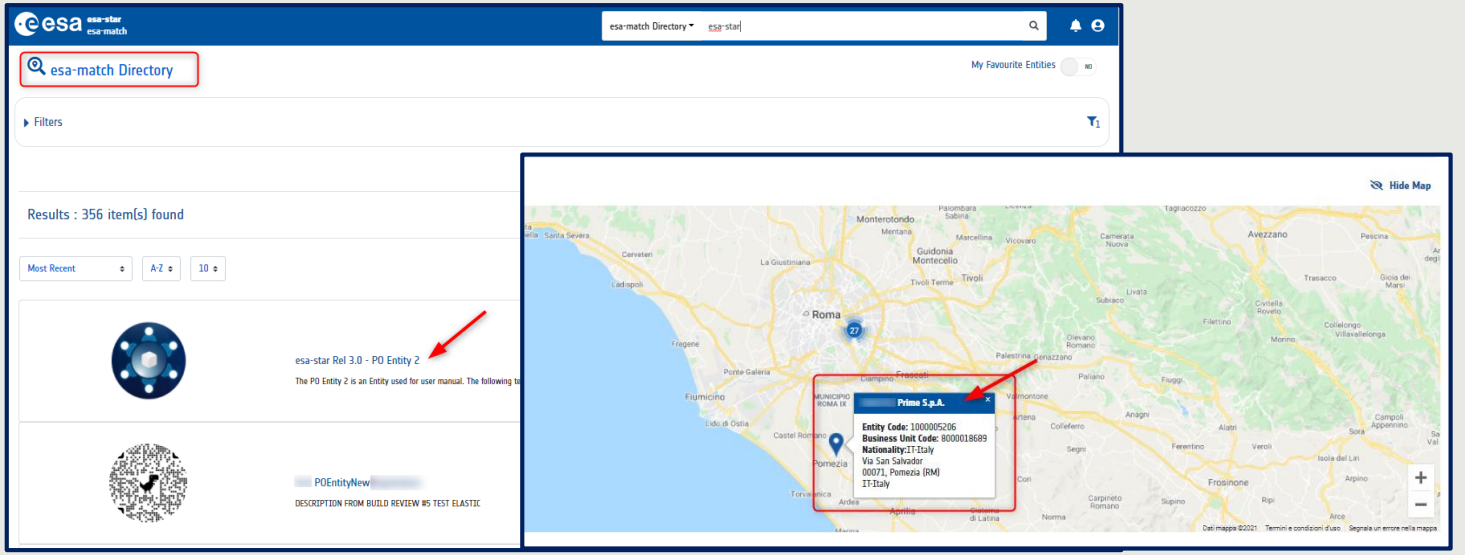
Entity Profile Page



esa-match directory

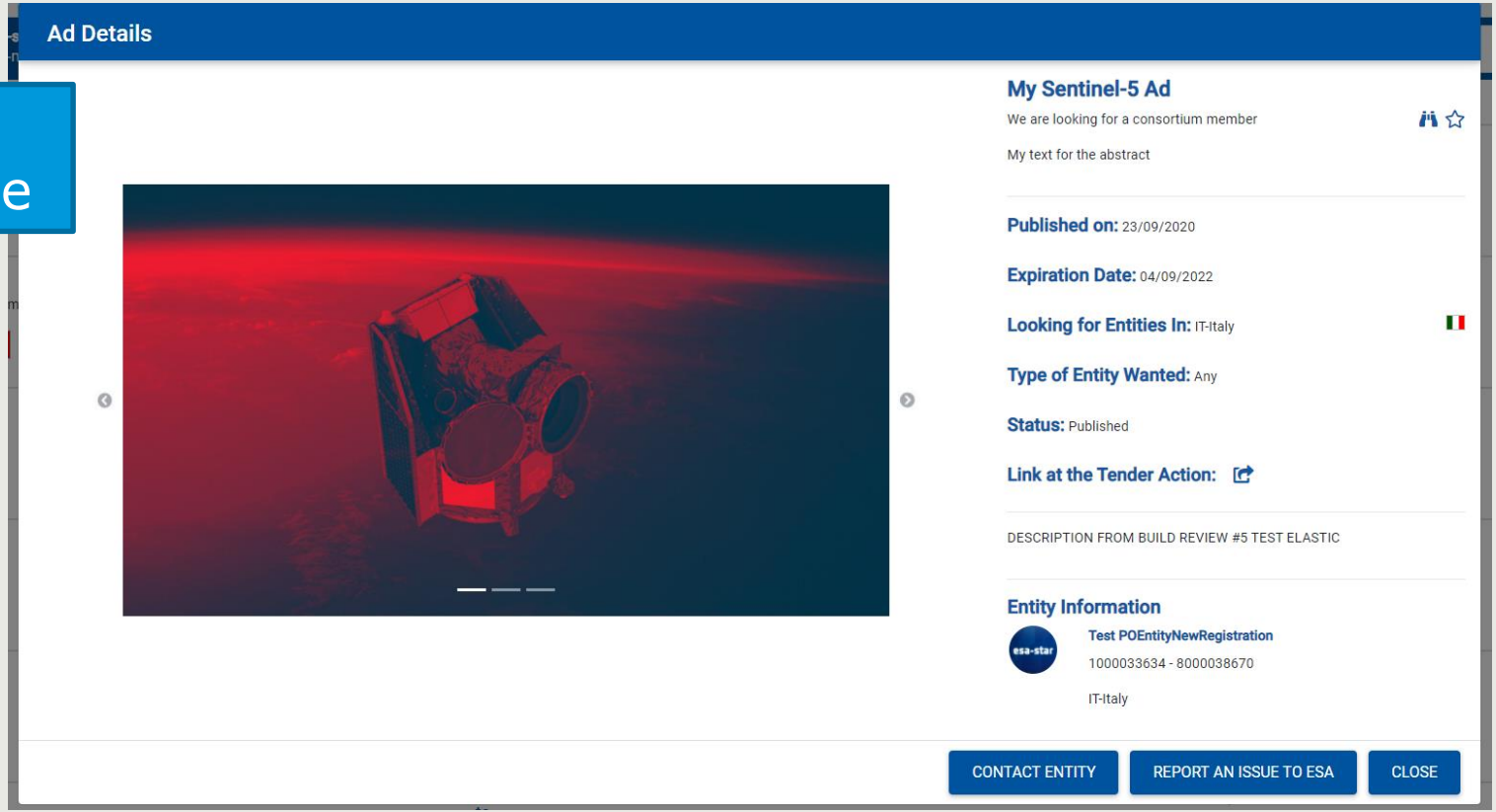
- To display, search and browse the list of entities in esa-match
- Entities are displayed in 2 different views:
  - As a list (by default)
  - As an interactive map (by clicking on "**Show Map**")

- List of entity profiles
- Map view of entities. A click reveals additional information and links to an entity's profile page



esa-match

esa-match marketspace



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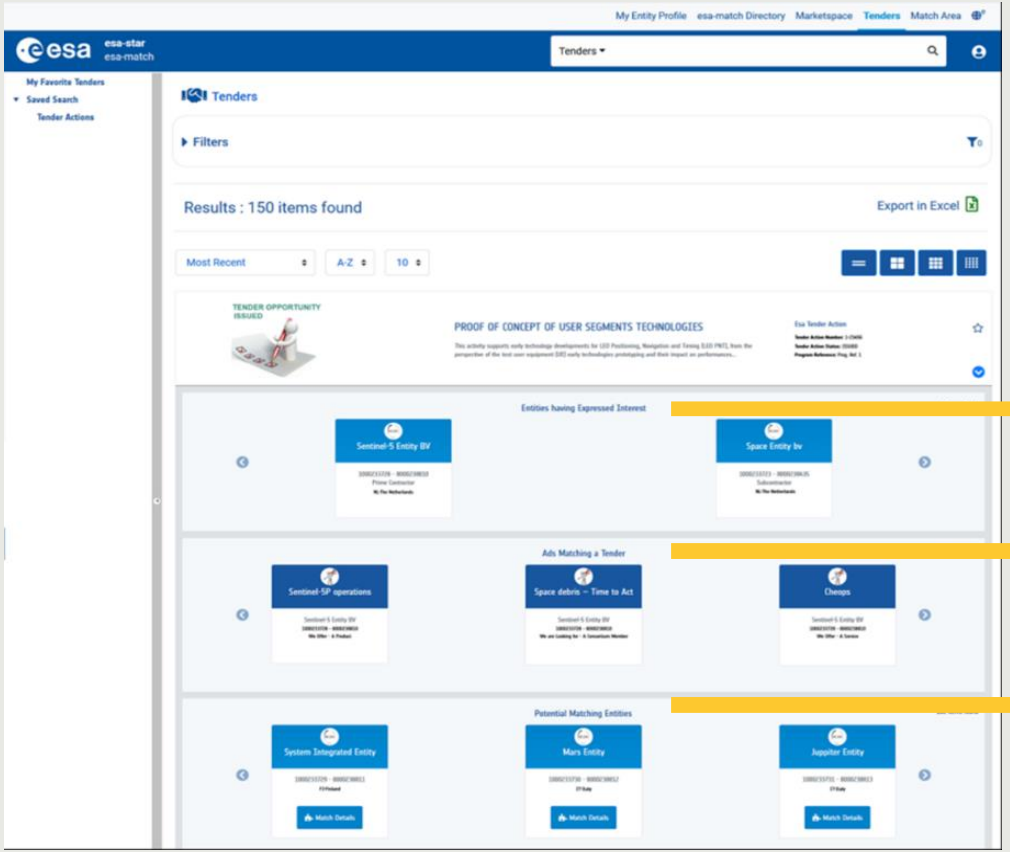
esa-match

esa-match Tenders



Expressions of Interest
This section shows all entities that have expressed interest in this particular tender (via esa-star Publication, the new EMITS)

Ads linked to the tender
This section shows all ads in the Marketspace linked to the tender which were placed by entities

Other Matching Entities
This section shows entities with matching Product and Technology keywords, identified automatically by the system

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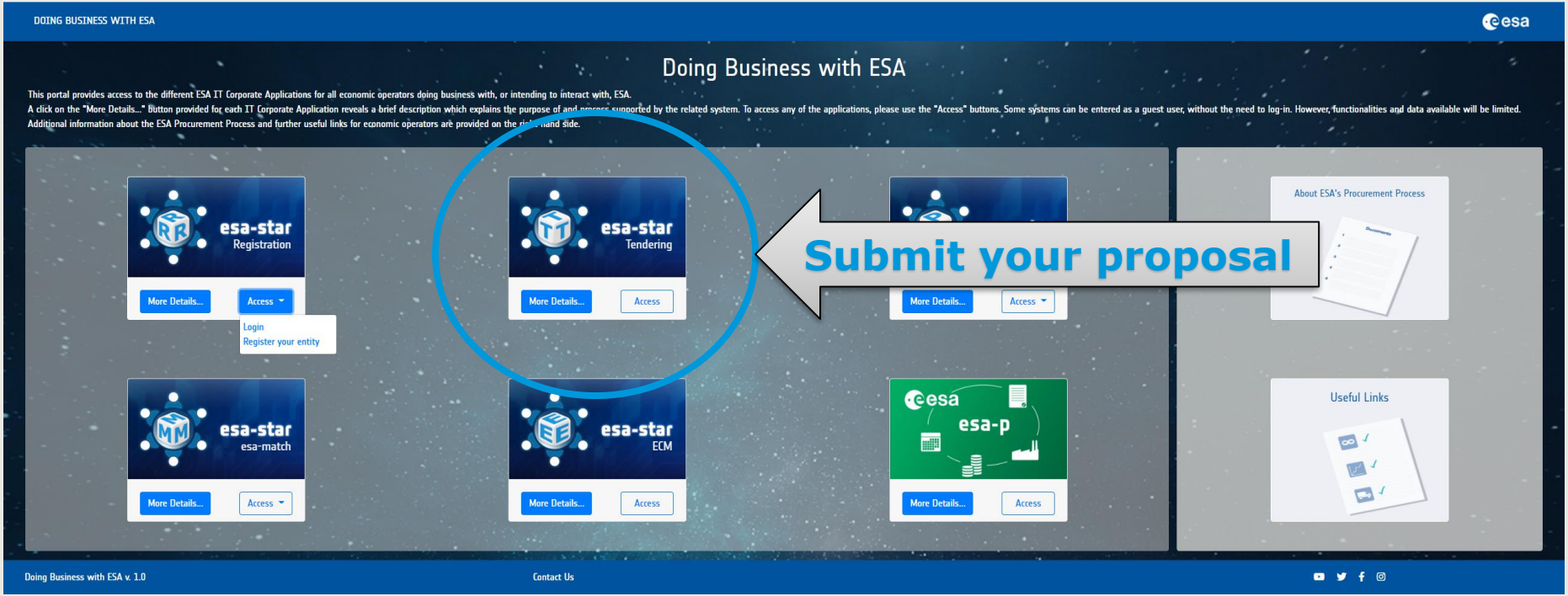
esa-star Tendering



esa-star Tendering (https://esastar.sso.esa.int/)

- covers the end-to-end tendering process
- supports offer preparation and submission to ESA for evaluation,
- management of clarifications and extension requests for Tender Actions

When you find an ITT in **in esa-star publication** for which you want to bid, you choose

You will be re-directed you to **esa-star Tendering** where you create your dedicated work area (the Bidder's Restricted Area). Here you may:

1. submit clarification and extension requests up to the deadlines set by ESA.
2. upload and submit offers to ESA.
3. recall your proposal at any time before the closing date.

Video: http://www.esa.int/spaceinvideos/Videos/2016/03/Bidder_Restricted_Area_creation_and_structure

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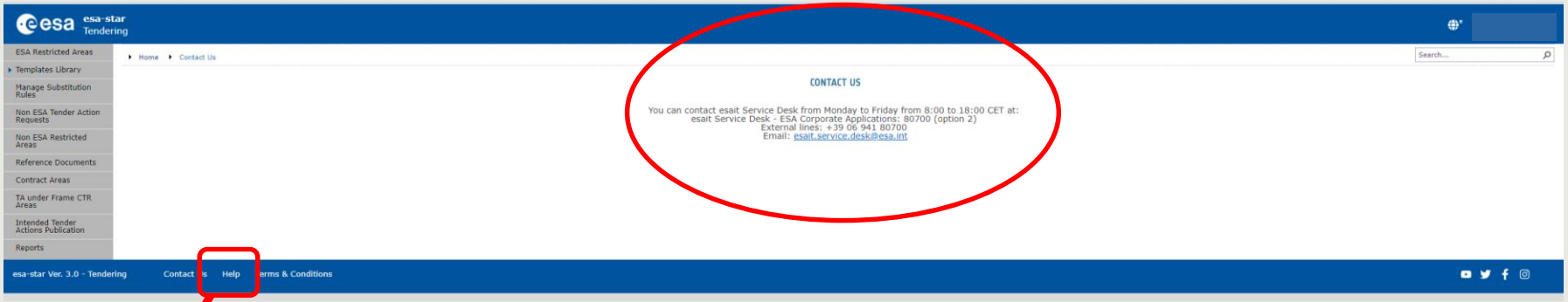
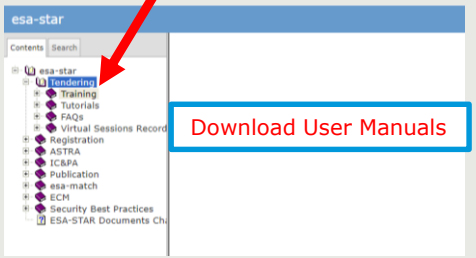
ESA – STAR Tendering





Questions on
esa-star Tendering?

Video: http://www.esa.int/spaceinvideos/Videos/2016/03/Offer_Preparation_and_Submission

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esa-p

You won't need to access esa-p until you have a contract with ESA

1. All financial aspects, like advance payments, milestones achievements with deliverables and invoicing/payments are dealt with using **esa-p**, ESA's financial tool based on SAP
2. You can request a username and password to our helpdesk:

   esait.Service.Desk@esa.int or +39 06 941 80700, option 2

   From 08:00 to 18:00 CET/CEST, Monday to Friday

Tutorials on how to use ESA-P are available on the supplier's portal:

http://esa-p-help.sso.esa.int

Important note for contract payments:

1) Advance payment is transferred after the signature of contract and submission of Advance Payment Request (APR) in esa-p:
http://esa-p-help.sso.esa.int/Extended_Guide_How_to_submit_and_approve_an_Advance_Payment_Request.pdf

2) Milestone payments are released after submission of Confirmation and Invoice in esa-p with relevant deliverables approved by ESA Technical Officer attached:

http://esa-p-help.sso.esa.int/Extended_Guide_How_to_submit_and_approve_a_MAC_confirmation.pdf

http://esa-p-help.sso.esa.int/Extended_Guide_How_to_submit_and_approve_an_Invoice.pdf

3) Tax exception:
Intra-community transactions supplied to an International (Governmental) Organisation (**like ESA**) are free of VAT according to Directive 2006/112/EC Article 151 1.b. if the related exemption form (still referring to Directive 77/388/EEC - Article 15/10) is issued and provided to the entitled supplier. Note subcontractor does not receive any VAT exemption certification, only the contractor who has a legal binding contract with ESA:
http://esa-p-help.sso.esa.int/no_VAT_details.html

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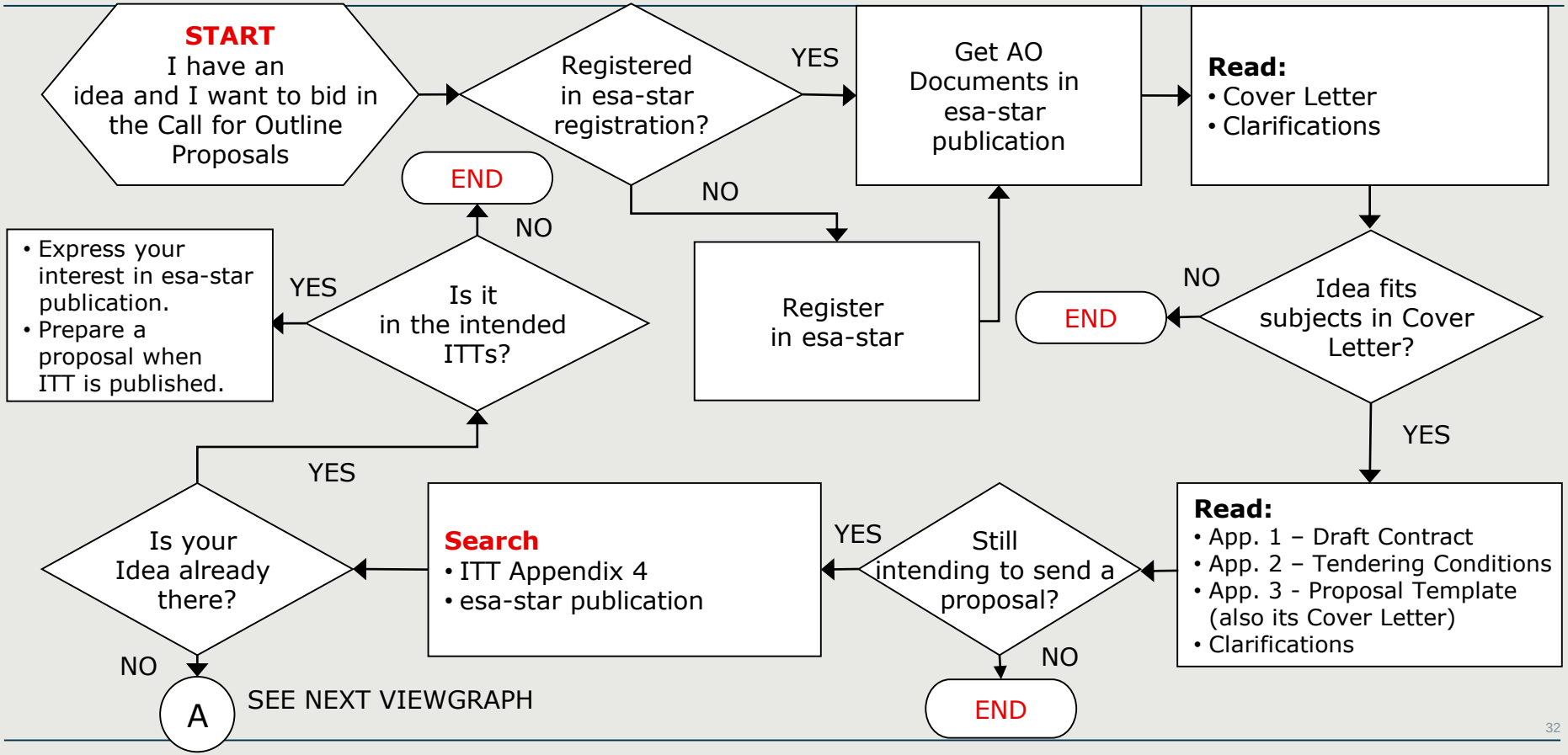
Basic Step-by-Step Recipe



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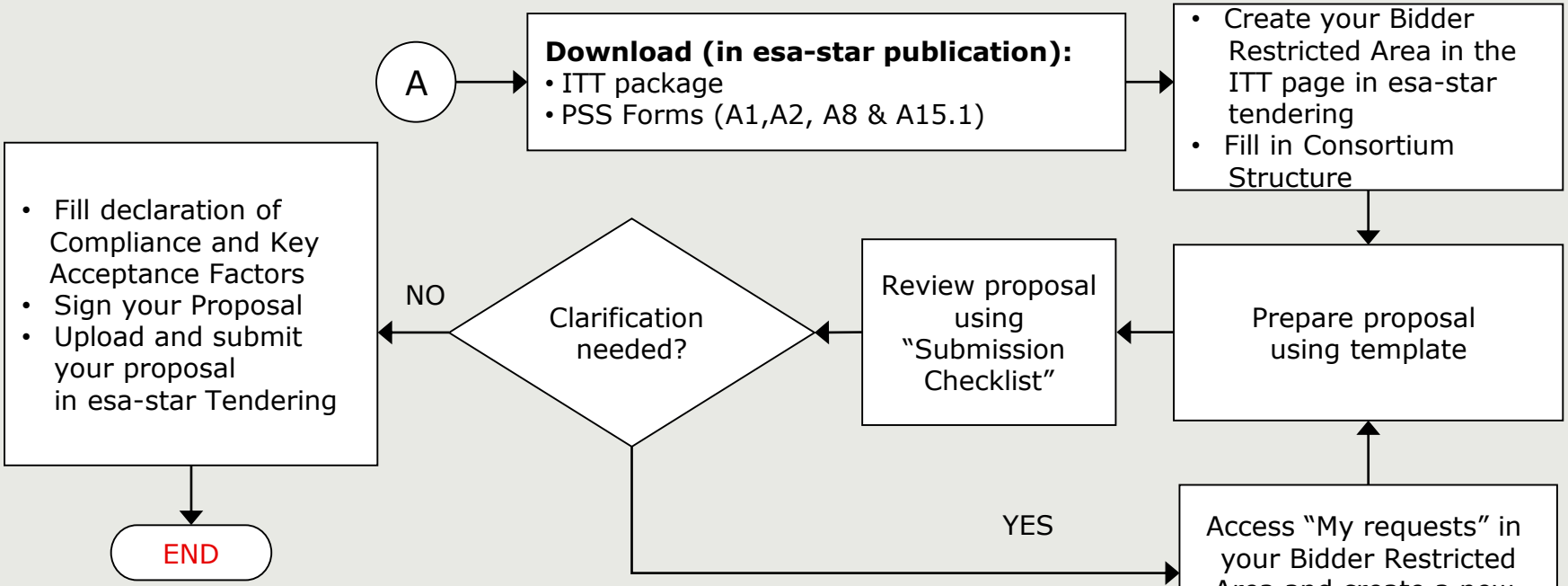
Basic Step-by-Step Recipe



- **ALL** questions related to this Invitation to Tender must be submitted via **esa-star Tendering** in your Bidder Restricted Area.

- Those Questions and Answers that are of relevance to all Tenderers, will be published on esa-star publication as a clarification for the benefit of all Tenderers.